



**Medicaid Administrative Claiming  
School Districts  
Documentation Requirement Training**

# Purpose

- Documentation requirements
- Importance of documenting activities
- Recommended narratives for the Time Study Form

# Background/Context

- Purpose of MAC
- OIG and CMS communication
- Reduce audit risk

# Narratives for the Time Study Form



# Appropriate Narratives Include

- What were you doing?
- Why were you doing it?
- Who were you doing it for?
- How does it relate to Medicaid?

## School Medicaid Administrative Claiming Time Study Form

|   |                               |  |                   |
|---|-------------------------------|--|-------------------|
| STAFF NAME (PRINT)  | JOB TITLE                     | DATE OF TIME STUDY (MM/DD/YY):                             |                   |
| SCHOOL DISTRICT   | SCHOOL BUILDING               |  |                   |
| This time study form represents the codable activities that I performed during the "Date of Time Study" above. I did not alter my normal routine for the time study. I did not use any other form to track my time for purposes of claiming administrative match funds.     |                               |  |                   |
| STAFF SIGNATURE   |                               | DATE   |                   |
| I reviewed this time study form and it is complete and in compliance with Medicaid Administrative Claiming program guidelines.  |                               |  |                   |
| SUPERVISOR'S SIGNATURE  |                               | DATE   |                   |
| <b>CODE IDENTIFIERS</b>   |                               |  | <b>Total Time</b> |
| <b>Code 3 – EDUCATIONAL SCHOOL RELATED ACTIVITIES</b> – Regular assigned duties, teaching, extra-curricular activities, IEP development, coordinating/monitoring IEPs, discipline, evaluating curriculum or instruction, career guidance, & general supervision of students |                               |  |                   |
| <b>Code 4 – DIRECT MEDICAL SERVICES</b> – Provision of care, treatment/patient follow-up, counseling services, related administrative/clerical activities, and staff related travel.  |                               |  |                   |
| <b>SYSTEM SUPPORT/PERSONAL ACTIVITIES</b>   | <b>Tick Marks 15-Min Each</b> | <b>Provide a Brief Narrative Description For "b" codes</b> | <b>Total Time</b> |
| <b>Code 10 – SYSTEM SUPPORT OR PERSONAL TIME</b> (Staff meetings, breaks, lunch, annual leave, and sick leave and Medicaid Ad Claiming Time Study Training.)  |                               |  |                   |
| <b>PARALLEL CODING ACTIVITIES</b>   |                               |  |                   |
| <b>OUTREACH</b>   |                               |  |                   |
| <b>Code 1a</b> – Inform students/families about general health education, wellness and prevention programs, IDEA and Child Find activities  |                               |  |                   |
| <b>Code 1b</b> – Inform students/families about Medicaid and Medicaid managed care and encourage access   |                               |  |                   |
| <b>FACILITATING APPLICATIONS</b>  |                               |  |                   |
| <b>Code 2a</b> – Explain eligibility process and how to apply for programs like IDEA, TANF, and reduced lunches   |                               |  |                   |
| <b>Code 2b</b> – Explain and assist students/families with Medicaid application process, verify current status  |                               |  |                   |
| <b>TRANSPORTATION</b>   |                               |  |                   |
| <b>Code 5a</b> – Scheduling or arranging transportation not in support of Medicaid covered services (e.g. social, vocational, and /or educational programs or activities)   |                               |  |                   |
| <b>Code 5b</b> – Scheduling or arranging transportation to Medicaid covered services  |                               |  |                   |
| <b>PROGRAM PLANNING, POLICY DEVELOPMENT AND INTERAGENCY COORDINATION</b>  |                               |  |                   |
| <b>Code 7a</b> – Improving coordination/delivery/planning for non-medical services (e.g. social, vocational, state mandated child health screening, policy development, for school aged children  |                               |  |                   |
| <b>Code 7b</b> – Improving coordination/delivery/planning of medical/dental/mental health/chemical dependency services to children  |                               |  |                   |
| <b>TRAINING (PARTICIPATION IN OR COORDINATION)</b>  |                               |  |                   |
| <b>Code 8a</b> – Improving delivery and referral to non-Medicaid services like IDEA/Child Find activities/programs  |                               |  |                   |
| <b>Code 8b</b> – Improving delivery and referral to Medicaid related services,  |                               |  |                   |

# Medicaid Outreach – Code 1b

Use this code when involved in activities that inform eligible or potentially eligible individuals about Medicaid and how to access the program; such activities include bringing potential eligibles into the Medicaid system for the purpose of the eligibility process. Both written and oral methods may be used.

# Medicaid Outreach – Code 1b

## Insufficient

- Gave a parent information on available health services

## Sufficient

- Informed the parents of a new student number 76298 or MK about Medicaid Apple Health services and encouraged them to apply for coverage.



# Medicaid Outreach – Code 1b

## Insufficient

- Talked to a student about access to care.

## Sufficient

- Provided student number 76298 or RK, who is pregnant and does not have medical coverage, with information about Maternity Support Services.

# Facilitating Applications – Code 2b

Use this code when assisting students/families with completing Apple Health applications, during regularly scheduled hours. Include related paperwork, clerical activities, or time study participant travel required to perform these activities

# Facilitating Applications – Code 2b

## Insufficient

- Helped fill out an application.

## Sufficient

Assisted student number 76298 or JK's family in locating an In-Person assister for help in filling out an Apple Health web-application.

# Facilitating Applications – Code 2b

## Insufficient

- I helped fill out an application

## Sufficient

Assisted student #76298 or KK's mother to complete a Medicaid application because the student needs a well-child exam and does not have medical coverage.

# Arranging Transportation – Code 5b

Use this code when assisting student/family with obtaining transportation either through the Medicaid Transportation Brokers or through other arrangements to services covered by Apple Health. This does not include the provision of the actual transportation or the direct costs (bus fare, taxi fare, etc.), but rather the administrative activities involved in arranging transportation.

# Arranging Transportation – Code 5b

## Insufficient

- Transportation for medical issue

## Sufficient

Called the Medicaid transportation broker to arrange student # 76298 or TK's transportation to a behavioral health appointment with Catholic Community Services.

## Program Planning, Policy Development and Interagency Coordination Related to Medical/Medicaid Services– Code 7b

Activities in direct support of the Medicaid agency and the Medicaid state plan associated with the development of strategies to improve the coordination and delivery of medical, dental, mental health, substance abuse treatment, and/or family planning services to individuals and families, and when performing collaborative activities with other agencies and/or providers.

# Program Planning, Policy Development, and Interagency Coordination – Code 7b

## Insufficient

- Attended a meeting on coordination of health services

## Sufficient

- Attended a meeting with Evergreen alcohol/drug treatment facility staff to discuss the referral process for students with drug or alcohol problems.



# Program Planning, Policy Development, and Interagency Coordination – Code 7b

## Insufficient

- Attended a meeting on coordination of health services

## Sufficient

- Attended a meeting with the local in-person assister organizations to discuss the referral process for students who need assistance with applying for Apple Health through the Health Benefits Exchange (HBE).

# Medical/Medicaid Related Training– Code 8b

Coordinating, conducting, or participating in training events regarding the benefits of Medical related services, and how to assist individuals and families in accessing such services and how to effectively refer them for services. This includes related paperwork, clerical activities, or time study participants travel required to perform these activities.

# Medical/Medicaid Related Training- Code 8b

## Insufficient

- Attended training on health issues

## Sufficient

- Attended training provided by Pioneer Family Practice on the process for referring Medicaid eligible students for well-child exams.

# Referral, Coordination and Monitoring– Code 9b

Making referrals for, coordinating, and monitoring the delivery of medical/Medicaid covered services such as medical, dental, mental health, substance abuse treatment, and/or family planning; this includes related paperwork, clerical activities, or time study participants travel required to perform these activities.

# Referral, Coordination and Monitoring- Code 9b

## Insufficient

- Gathered information for health concerns.

## Sufficient

- Wrote up a summary of observed behavior to make a referral for student number 76298 or SK for a substance abuse evaluation with the Evergreen treatment facility.

# Referral, Coordination and Monitoring- Code 9b

## Insufficient

- Monitoring substance abuse.

## Sufficient

- Met with the school nurse and provided information –related observations regarding student number 76298 or JK, in my class who seems to be lethargic, and has difficulty concentrating. I explained I have concerns the student may have possible substance abuse issues and developed a plan to continue observing the student's behavior and report back to the nurse once a week.

# Referral, Coordination and Monitoring- Code 9b

## Insufficient

- Referred a students for a medical concern.

## Sufficient

- Student number 76298 or SK complained of difficulty seeing the white board, called parent to suggest scheduling a vision exam for number 76298 or SK.

# Support Documentation

Examples include, but are not limited to:

- Plan books
- Chart notes
- Activity logs
- Calendars



# Other Examples of Support Documentation

- Travel logs that reflect the date and time span with notes regarding the purpose of the travel.
- Phone logs that reflect the date and time span with notes regarding the topic of phone conversation.
- A meeting agenda with a notation of the topic being discussed.
- An email to yourself that provides details of the MAC activity performed and, if possible, other documentation to support the details.

# Retention Schedule

- Time study results -6- year retention

# Comments and Closing

Send written comments to  
Your MAC Program Specialist

[www.hca.wa.gov/medicaid/mac/pages/school.aspx](http://www.hca.wa.gov/medicaid/mac/pages/school.aspx)

# Where Can I Find Out More?

## Resources for Families

**How to apply for Washington Apple Health (Medicaid):**

[www.wahealthplanfinder.org](http://www.wahealthplanfinder.org)

**Find your local Community Service Office:**

[www.dshs.wa.gov/onlinecso/findservice.shtml](http://www.dshs.wa.gov/onlinecso/findservice.shtml)

**Other non-medical services:**

[www.washingtonconnection.org/home/exploreeoptions.gov](http://www.washingtonconnection.org/home/exploreeoptions.gov)

# Where can I find out more?

## MAC Resources

For MAC Manual, CMS Guide, and Memorandums please visit:

[www.hca.wa.gov/medicaid/mac/pages/school.aspx](http://www.hca.wa.gov/medicaid/mac/pages/school.aspx)